

United States Department of Education
Rehabilitation Services Administration

ANNUAL PAYBACK REPORT
User Guide and Instructions

October 2009

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This user guide provides instructions to grantees on how to fill out the annual Rehabilitation Services Administration (RSA) Payback Reporting form. This form must be submitted every year by grantees that receive funds from the Department of Education to provide financial assistance to students who are pursuing certificates or degrees in areas of rehabilitation services that are experiencing personnel shortages. Grantees are required to submit data for every grant they receive. This means one grantee may submit multiple reports each year.

Grantees are required by federal regulation to report data to RSA on all students (known as RSA scholars) who receive financial assistance.

This includes reporting on every scholar's academic and employment progress until every scholar completes his/her payback obligation¹.

Data for every student is required every year under each grant until every student supported by the grant fulfills his/her payback obligation through qualified employment. This means grantees may be submitting payback reports beyond the life of the grant. The applicable statute and regulations are available on the RSA website at the following address: www.ed.gov/rsa and are also included as attachments at the end of the user guide. Grantees should contact their RSA project officer for technical assistance or for additional clarification.

All information pertaining to RSA scholars is submitted to the Department of Education via the RSA Management Information System (MIS). Contact information for the RSA MIS help desk and RSA program analysts who oversee the Payback system are included at the end of the manual. Grantees must obtain a user identification and password from RSA in order to enter the MIS system. Instructions for using the RSA MIS system can be obtained at: <http://rsamis.ed.gov>. The MIS has been subjected to and has passed the Section 508 compliance accessibility testing by the Department of Education. In addition, the MIS has been tested for access via Internet Explorer and Netscape. Any questions or requests for technical assistance should be directed to the MIS Administrator at 202-245-6589 or RSAMIS.Technical.Support@ed.gov.

¹ Students who receive scholarships are required to work within the public rehabilitation program for two years for every year of full-time scholarship support.

Screen One

The following table (see Figure 1) outlines the information contained on Screen One.

RSA staff will set up the report shell and enter basic grantee information. Grantees should review the information to ensure it is accurate and up to date. The shaded boxes highlighted on this screen are locked down and cannot be edited. If there are any changes or mistakes in these fields the grantee should contact the RSA MIS Administrator for assistance.

Grantees are able to modify the following fields as needed: project director, phone and email.

Figure 1: *Screen One General Information*

<i>Screen 1 of 6</i>	
<i>General Information</i>	
Grantee	
Project Director	
Phone	
Email Address	
Grant Number	
Grant Amount	
Rehab Field of Training	
If “other” please explain	
Reporting period (last Fiscal Year completed)	

The first time a grantee submits a payback report for a grant, they should indicate the rehabilitation field of training supported by the specific grant in the field labeled **“Rehab Field of Training”**. Grantees will select one of the following choices from the drop down menu: Comprehensive System of Personnel Development, Job Development/Placement, Rehab Admin, Rehab Counseling/PhD, Rehab Counseling/Masters, Rehab/Blind, Rehab/Deaf, Rehab/Mentally Ill, Rehab Psychology, Rehab Technology, Undergraduate Education/Rehab Services, Vocational Evaluation/Work Adjustment, Other.

If “other” is selected, the grantee should type the field of training in the field labeled **“If “other” please explain”**.

The last data field requests the reporting period, **Reporting period (last Fiscal Year completed)**. Grantees submit a report every year detailing scholar activity and status through September 30. The payback reporting system is open each year from October 1 through November 30. *Example: For FY 2009’s report, grantees will submit data on all current and exited scholars collected between October 1, 2008 and September 30, 2009.*

RSA will accept reports for this time frame starting October 1, 2009. The system will close November 30, 2009.

When all of the fields are completed, click SAVE and proceed to the next screen.

Screen Two

Screen Two is where grantees start entering student data. This screen asks for information on every scholar receiving financial support under the grant. The following table (see Figure 2) outlines the information contained on Screen Two.

This screen asks for specific information on each RSA scholar who received scholarships under this particular grant number. *Note: the information entered in this screen will carry over each year. Grantees must verify the status of every scholar each year.* Scholar status will be coded as *Current* or *Exited* using the drop down box under the “Status” field. When a scholar is coded as “current” their information will roll over to Screen Three, “**RSA Current Scholars**”. When the status changes from “current” to “exited” the scholar’s profile will move from Screen Three to Screen Four, “**RSA Exited Scholars**”.

Grantees cannot delete a student from the payback system. Grantees must contact the RSA MIS help desk if they wish to remove scholars or rows from any screen.

Figure 2: *Screen 2, Add/Edit Scholars*

Screen 2 of 6
Training Grants - Grantee Reporting Form
Add / Edit Scholars

Name of RSA scholar	Status	Scholar start date	Total support all years	Payback agreement signed and on file?	Current address on file?
<i>Text field</i>	<i>Drop down</i>	<i>Text field</i>	<i>Cumulative total updated automatically each year: no data entry</i>	<i>Check box</i>	<i>Check box</i>

Name of RSA Scholar: This is a text field. Every student who receives support under the grant must be entered. The information will remain on the report each year until the payback obligation is fulfilled. Once a student is entered into the system the grantee cannot delete the information.

Status: This is a drop down box that offers 2 choices: current or exited. Current students are those individuals actively participating in a degree/certificate track program. Exited refers to students who have graduated or left the program for other reasons. Grantees will be asked to provide additional information about graduates or exited students on another screen.

Scholar Start Date: Enter the date the student entered the program. Please use the following format: MM/DD/YYYY. Example: if a student entered into your program on September 1, 2009 you will enter the data as: 09/01/2009. *It is critical that the data entered in this field is correct; it will be used to calculate the total payback obligation owed by the scholar.*

Total Support All Years: This information will be updated based on data the grantee inputs on future screens. No data needs to be entered into this field; it automatically populates based on data entered elsewhere on the form.

Payback agreement signed and on file: This is a check box. Grantees are required to check this box each year a form is submitted. *It is the grantee's responsibility to ensure that the scholar signs all payback agreement forms and hard copies are kept by the grantee.*

Current address on file: This is a check box. Grantees are required verify that the scholar's address and contact information is current.

When all of the fields are completed, click SAVE and proceed to the next screen.

Screen Three

Screen Three asks for information on all current RSA scholars who are enrolled in academic programs. The following table (see Figure 3) outlines the information contained on Screen Three.

Figure 3: *Screen 3, Information on Current Scholars*

<i>Screen 3 of 6</i>			
RSA Current Scholars			
Name of RSA scholar	Academic degree sought	Student status	Scholarship amount current year
<i>Populated</i>	<i>Drop down</i>	<i>Drop down</i>	<i>Text field</i>

Academic degree sought: This is a drop down box that offers four choices: Bachelors, Masters, Ph.D. or Certificate. Select the appropriate degree track for each scholar.

Student status: This is a drop down box that offers two choices: Full-time or Part-time. Select the appropriate student status for each scholar.

Scholarship amount current year: This is a text box. Grantees should enter the amount of money each scholar received during the fiscal year being reported.

The scholar's information will remain on Screen Three until the student status is changed from "current" to "exited". The information should be checked each year for accuracy. Once a student exits the program, his/her information will roll over to Screens Four and Five.

When all of the fields are completed, click SAVE and proceed to the next screen.

Screen Four

Screen four asks for information regarding the scholar's exit date, reason for exit and the dates related to employment. The following table (see Figure 4) outlines the information contained on Screen Four.

Figure 4: *Screen 4, Information on Exited Scholars*

Screen 4 of 6
RSA Exited Scholars

Name of RSA scholar	Why did this scholar exit the program?	Date exited the program	Date work must begin (including 2 years grace)	Date by which work must be completed (including 2 years grace)
<i>Populated</i>	<i>Drop down</i>	<i>Text field</i>	<i>Text field</i>	<i>Check box</i>

Why did this scholar exit the program? This is drop down box offers three choices: graduated, dropped out or expelled/removed from the program. If a scholar exits the program without graduating the grantee should ensure documentation is retained in the student file to explain why the scholar is dropping out or was expelled. *Note: even when a scholar leaves a program for reasons other than graduating they are still required to fulfill their payback obligation by either working in qualified employment or making arrangement to financially pay back their scholarship to the Department of Education.*

Date graduated or exited the program: This is a text box. Enter the scholar's graduation or program exit date using the MM/DD/YYYY format.

Date work must begin (including 2 years grace): This is a text box. Enter the date each scholar is required to start work in a qualified field of employment. This date is derived using the information from the previous field; *date graduated or exited the program.*

Date by which work must be completed (including 2 year grace period): This is a text box. Grantees should manually calculate when a scholar must complete their payback obligation and enter the date into this field.

RSA is asking for information related to when work must begin and projected completion date in order to estimate how many years a scholar will appear on the required annual report. This information also can be used by grantees to ensure that scholars are on track to meet their payback obligation within the established regulatory timeframe.

The specific regulations pertaining to the scholar’s payback obligation are outlined in 34 CFR Part 386 Rehabilitation Training: Rehabilitation Long-Term Training Subpart E. When calculating *the date work must begin* field, grantees should include the two-year grace period every scholar is granted upon graduating/exiting from the program.

When all of the fields are completed, click SAVE and proceed to the next screen.

Screen Five

Screen five asks for information regarding the scholar’s employment status and progress towards fulfilling the payback obligation. The following table (see Figure 5) outlines the information contained on Screen Five.

Figure 5: *Screen 5, Information on Exited Scholars (continued)*

Screen 5 of 6
RSA Exited Scholars

Name of RSA scholar	Employment status	If deferment or waiver or non-qualifying employment, explain	Number of work years owed	Work years completed to date	Payback complete?
	<i>Drop down</i>	<i>Text field</i>	<i>Text field</i>	<i>Text field</i>	<i>Automatically populates: no data entry required</i>

Employment Status: This drop down choice offers seven options to best describe the employment obtained by the scholar: State Voc. Rehab, Qualified Non-Profit, Qualified For-Profit, Qualified Federal, Non-qualified Employment², Deferment, or Waiver.

² Scholars working in “non-qualified “ employment are still responsible for fulfilling their payback obligation by the established due date. Employment requirements are outlined in Section 386.34 (1) (i) (A) (B) (C) of the Code of Federal Regulations.

If deferment or waiver or non-qualifying employment, explain: If the grantee selects Non-qualified Employment, Deferment, or Waiver in the “Employment Status” field, the grantee should add text in this field explaining why the scholar is not in employment that satisfies their payback obligation. If the scholar has obtained a deferment or waiver the grantee is required to obtain all of the necessary documentation to support the decision to grant them.

Number of work years owed: This is a text box. Grantees must calculate the payback obligation owed by each scholar. This number is derived by the number of years of financial support received by the scholar.

Work years completed to date: This is a text box. Grantees must manually enter this information into the report each year. Grantees are responsible for following up with scholars in payback status to ensure scholars are 1) gainfully employed in an position that meets the definition for qualified employment, 2) updates the record to reflect any changes in employment on an annual basis and 3) updates the number of work years owed by each grantee.

Payback complete? This field self-populates based on information contained in prior cells. When the number of work years owed equals the number of work years completed to date the field will automatically put “Yes” in the payback complete column. *Grantees cannot populate this field; the MIS automatically populates it.* When a scholar successfully completes the payback obligation his/her information is archived and the grantee is no longer obligated to collect information on the individual.

After all of the relevant data is entered into Screen Five the MIS will move to the final screen, Screen Six.

Screen Six

Screen Six has three data fields that must be updated each year: name of individual submitting the form, the title of the person submitting the form and the date. Screen Six also provides a detailed summary of all information collected on the form. It provides a snapshot of scholar information, including employment, for each grantee. The shaded boxes are pre-populated based on data entered into the previous screens. This information can be used as a project management tool for grantees. This screen also provides RSA with a quick snapshot of the progress for all RSA scholars for each grant. Staff can see how many scholars are being supported and what their education and employment outcomes are along with other information necessary for analysis.

The following table (see Figure 6) outlines the information contained on Screen Six.

Figure 6: *Screen 6, Summary*

Screen 6 of 6

Training Grants - Grantee Reporting Form
Signatures

Total support all years to date	
Total scholarship amount current year	
Average number of work years owed	
Total number of scholars on this report	
Total number of current scholars	
Total number of full time scholars	
Total number of part time scholars	
Total number of graduated scholars	
Total number who exited without graduating	
Total for whom payback is complete	
Total for whom payback is not complete	
Total number of scholars in unqualified employment	
Total number of temporary deferments	
Total number of waivers	
Name of individual submitting this form	
Title of individual submitting this form	
Date	

Once a grantee completes a payback form for a specific grant number the information will roll over from year to year and should be reviewed and updated on an annual basis for accuracy. When a scholar successfully fulfills their payback obligation (as noted on Screen Five) the scholar's information will be archived by the RSA MIS and the information will not carry over to the next reporting year.

Dates for Annual Payback Report Submissions

Payback reports open on October 1 of each year and remain open through November 30. If you need additional time or assistance with your report please contact the following Department of Education staff **prior** to the November 30 closing date:

Ken Schellenberg
Administrator, RSA MIS
202-245-6589
RSAMIS.Technical.Support@ed.gov.

Traci DiMartini
Program Analyst, RSA Payback Form
202-245-6425
traci.dimartini@ed.gov

Grantees also should contact the RSA Project Officer responsible for administering each grant when there are questions during the payback process. Project Officers are available to provide technical assistance and guidance to ensure grantees successfully submit all required grant reports.

Attachment A: Regulatory Authority

Title 34—Education

Chapter III—Office of Special Education and Rehabilitation Services,
Department of Education

Part 386 Rehabilitation Training: Rehabilitation Long-Term Training

Subpart D What Conditions Must Be Met After an Award?

Sec. 386.33 What are the requirements for grantees in disbursing scholarships?

(a) Before disbursement of scholarship assistance to an individual,
a grantee--

(1)(i) Shall obtain documentation that the individual is--

(A) A U.S. citizen or national; or

(B) A permanent resident of the Republic of the Marshall Islands,
Federated States of Micronesia, Republic of Palau, or the Commonwealth
of the Northern Mariana Islands; or

(ii) Shall confirm from documentation issued to the individual by
the U.S. Immigration and Naturalization Service that he or she--

(A) Is a lawful permanent resident of the United States; or

(B) Is in the United States for other than a temporary purpose with
the intention of becoming a citizen or permanent resident; and

(2) Shall confirm that the applicant has expressed interest in a
career in clinical practice, administration, supervision, teaching, or
research in the vocational rehabilitation, supported employment, or
independent living rehabilitation of individuals with disabilities,
especially individuals with severe disabilities;

(3) Shall have documentation that the individual expects to maintain
or seek employment in a designated State rehabilitation agency or in a
nonprofit rehabilitation, professional corporation, professional
practice group, or related agency providing services to individuals with
disabilities or individuals with severe disabilities under an agreement
with a designated State agency;

(4) Shall reduce the scholarship by the amount in which the combined
awards would be in excess of the cost of attendance, if a scholarship,
when added to the amount the scholar is to receive for the same academic
year under title IV of the Higher Education Act, would otherwise exceed
the scholar's cost of attendance;

(5) Shall limit scholarship assistance to the individual's cost of
attendance at the institution for no more than four academic years
except that the grantee may provide an extension consistent with the
institution's accommodations under section 504 of the Act if the grantee
determines that an individual has a disability that seriously affects

the completion of the course of study; and

(6) Shall obtain a Certification of Eligibility for Federal Assistance from each scholar as prescribed in 34 CFR 75.60, 75.61, and 75.62.

Sec. 386.34 What assurances must be provided by a grantee that intends to provide scholarships?

A grantee under this part that intends to grant scholarships for any academic year beginning after June 1, 1992, shall provide the following assurances before an award is made:

(a) Requirement for agreement. No individual will be provided a scholarship without entering into a written agreement containing the terms and conditions required by this section. An individual will sign and date the agreement prior to the initial disbursement of scholarship funds to the individual for payment of the individual's expenses, such as tuition.

(b) Disclosure to applicants. The terms and conditions of the agreement that the grantee enters into with a scholar will be fully disclosed in the application for scholarship.

(c) Form and terms of agreement. Each scholarship agreement with a grantee will be in the form and contain the terms that the Secretary requires, including at a minimum the following provisions:

(1) The scholar will--

(i) Maintain employment--

(A) In a nonprofit rehabilitation agency or related agency or in a State rehabilitation agency or related agency, including a professional corporation or professional practice group through which the individual has a service arrangement with the designated State agency;

(B) On a full- or part-time basis; and

(C) For a period of not less than the full-time equivalent of two years for each year for which assistance under this section was received, within a period, beginning after the recipient completes the training for which the scholarship was awarded, of not more than the sum of the number of years required in this paragraph and two additional years; and

(ii) Repay all or part of any scholarship received, plus interest, if the individual does not fulfill the requirements of paragraph (c)(1)(i) of this section, except as the Secretary by regulations may provide for repayment exceptions and deferrals.

(2) The employment obligation in paragraph (c)(1) of this section as applied to a part-time scholar will be based on the accumulated academic years of training for which the scholarship is received.

(3) Until the scholar has satisfied the employment obligation described in paragraph (c)(1) of this section, the scholar will inform

the grantee of any change of name, address, or employment status and will document employment satisfying the terms of the agreement.

(4) Subject to the provisions in Sec. 386.41 regarding a deferral or exception, when the scholar enters repayment status under Sec. 386.43(e), the amount of the scholarship that has not been retired through eligible employment will constitute a debt owed to the United States that--

(i) Will be repaid by the scholar, including interest and costs of collection as provided in Sec. 386.43; and

(ii) May be collected by the Secretary in accordance with 34 CFR part 30, in the case of the scholar's failure to meet the obligation of Sec. 386.43.

(d) Executed agreement. The grantee will provide an original executed agreement upon request to the Secretary.

(e) Standards for satisfactory progress. The grantee will establish, publish, and apply reasonable standards for measuring whether a scholar is maintaining satisfactory progress in the scholar's course of study. The Secretary considers an institution's standards to be reasonable if the standards--

(1) Conform with the standards of satisfactory progress of the nationally recognized accrediting agency that accredits the institution's program of study, if the institution's program of study is accredited by such an agency, and if the agency has those standards;

(2) For a scholar enrolled in an eligible program who is to receive assistance under the Rehabilitation Act, are the same as or stricter than the institution's standards for a student enrolled in the same academic program who is not receiving assistance under the Rehabilitation Act; and

(3) Include the following elements:

(i) Grades, work projects completed, or comparable factors that are measurable against a norm.

(ii) A maximum timeframe in which the scholar shall complete the scholar's educational objective, degree, or certificate.

(iii) Consistent application of standards to all scholars within categories of students; e.g., full-time, part-time, undergraduates, graduate students, and students attending programs established by the institution.

(iv) Specific policies defining the effect of course incompletes, withdrawals, repetitions, and noncredit remedial courses on satisfactory progress.

(v) Specific procedures for appeal of a determination that a scholar is not making satisfactory progress and for reinstatement of aid.

(f) Exit certification. The grantee has established policies and procedures for receiving written certification from scholars at the time of exit from the program acknowledging the following:

(1) The name of the institution and the number of the Federal grant

that provided the scholarship.

(2) The scholar's field of study.

(3) The number of years the scholar needs to work to satisfy the work requirements in Sec. 386.34(c)(1)(i)(C).

(4) The total amount of scholarship assistance received subject to the work-or-repay provision in Sec. 386.34(c)(1)(ii).

(5) The time period during which the scholar must satisfy the work requirements in Sec. 386.34(c)(1)(i)(C).

(6) All other obligations of the scholar in Sec. 386.34.

(g) Tracking system. The grantee has established policies and procedures to determine compliance of the scholar with the terms of the agreement. In order to determine whether a scholar has met the work-or-repay provision in Sec. 386.34(c)(1)(i), the tracking system must include for each employment position maintained by the scholar--

(1) Documentation of the employer's name, address, dates of the scholar's employment, and the position the scholar maintained;

(2) Documentation of how the employment meets the requirements in Sec. 386.34(c)(1)(i); and

(3) Documentation that the grantee, if experiencing difficulty in locating a scholar, has checked with existing tracking systems operated by alumni organizations.

(h) Reports. The grantee shall make reports to the Secretary that are necessary to carry out the Secretary's functions under this part.

(i) Records. The grantee shall maintain the information obtained in paragraphs (g) and (h) of this section for a period of time equal to the time required to fulfill the obligation under Sec. 386.34(c)(1)(i)(C).

Sec. 386.35 What information must be provided by a grantee that is an institution of higher education to assist designated State agencies?

A grantee that is an institution of higher education provided assistance under this part shall cooperate with the following requests for information from a designated State agency:

(a) Information required by section 101(a)(7) of the Act which may include, but is not limited to--

(1) The number of students enrolled by the grantee in rehabilitation training programs; and

(2) The number of rehabilitation professionals trained by the grantee who graduated with certification or licensure, or with credentials to qualify for certification or licensure, during the past year.

(b) Information on the availability of rehabilitation courses leading to certification or licensure, or the credentials to qualify for certification or licensure, to assist State agencies in the planning of a program of staff development for all classes of positions that are involved in the administration and operation of the State agency's

vocational rehabilitation program.

Subpart E What Conditions Must Be Met by a Scholar?

Sec. 386.40 What are the requirements for scholars?

A scholar--

- (a) Shall receive the training at the educational institution or agency designated in the scholarship; and
- (b) Shall not accept payment of educational allowances from any other Federal, State, or local public or private nonprofit agency if that allowance conflicts with the individual's obligation under Sec. 386.33(a)(4) or Sec. 386.34(c)(1).
- (c) Shall enter into a written agreement with the grantee, before starting training, that meets the terms and conditions required in Sec. 386.34;
- (d) Shall be enrolled in a course of study leading to a certificate or degree in one of the fields designated in Sec. 386.1(b); and
- (e) Shall maintain satisfactory progress toward the certificate or degree as determined by the grantee.

Sec. 386.41 Under what circumstances does the Secretary grant a deferral or exception to performance or repayment under a scholarship agreement?

A deferral or repayment exception to the requirements of Sec. 386.34(c)(1) may be granted, in whole or part, by the Secretary as follows:

- (a) Repayment is not required if the scholar--
 - (1) Is unable to continue the course of study or perform the work obligation because of a disability that is expected to continue indefinitely or result in death; or
 - (2) Has died.
- (b) Repayment of a scholarship may be deferred during the time the scholar is--
 - (1) Engaging in a full-time course of study at an institution of higher education;
 - (2) Serving, not in excess of three years, on active duty as a member of the armed services of the United States;
 - (3) Serving as a volunteer under the Peace Corps Act;
 - (4) Serving as a full-time volunteer under title I of the Domestic Volunteer Service Act of 1973;
 - (5) Temporarily totally disabled, for a period not to exceed three years; or
 - (6) Unable to secure employment as required by the agreement by reason of the care provided to a disabled spouse for a period not to exceed 12 months.

Sec. 386.42 What must a scholar do to obtain a deferral or exception to performance or repayment under a scholarship agreement?

To obtain a deferral or exception to performance or repayment under a scholarship agreement, a scholar shall provide the following:

(a) Written application. A written application must be made to the Secretary to request a deferral or an exception to performance or repayment of a scholarship.

(b) Documentation. (1) Documentation must be provided to substantiate the grounds for a deferral or exception.

(2) Documentation necessary to substantiate an exception under Sec. 386.41(a)(1) or a deferral under Sec. 386.41(b)(5) must include a sworn affidavit from a qualified physician or other evidence of disability satisfactory to the Secretary.

(3) Documentation to substantiate an exception under Sec. 386.41(a)(2) must include a death certificate or other evidence conclusive under State law.

Sec. 386.43 What are the consequences of a scholar's failure to meet the terms and conditions of a scholarship agreement?

In the event of a failure to meet the terms and conditions of a scholarship agreement or to obtain a deferral or an exception as provided in Sec. 386.41, the scholar shall repay all or part of the scholarship as follows:

(a) Amount. The amount of the scholarship to be repaid is proportional to the employment obligation not completed.

(b) Interest rate. The Secretary charges the scholar interest on the unpaid balance owed in accordance with 31 U.S.C. 3717.

(c) Interest accrual. (1) Interest on the unpaid balance accrues from the date the scholar is determined to have entered repayment status under paragraph (e) of this section.

(2) Any accrued interest is capitalized at the time the scholar's repayment schedule is established.

(3) No interest is charged for the period of time during which repayment has been deferred under Sec. 386.41.

(d) Collection costs. Under the authority of 31 U.S.C. 3717, the Secretary may impose reasonable collection costs.

(e) Repayment status. A scholar enters repayment status on the first day of the first calendar month after the earliest of the following dates, as applicable:

(1) The date the scholar informs the Secretary he or she does not plan to fulfill the employment obligation under the agreement.

(2) Any date when the scholar's failure to begin or maintain employment makes it impossible for that individual to complete the

employment obligation within the number of years required in Sec. 386.34(c)(1).

(f) Amounts and frequency of payment. The scholar shall make payments to the Secretary that cover principal, interest, and collection costs according to a schedule established by the Secretary.

Attachment B: Statutory Authority for RSA Payback Report

Section 13 of the Rehabilitation Act, as amended (the Act) requires the Commissioner of the Rehabilitation Services Administration (RSA) to submit an annual report to the Congress on the activities carried out under this Act, including statistical data reflecting services and activities provided individuals during the preceding fiscal year. Section 14(a) of the Act further requires an evaluation of the impact of programs under the Act, including their general effectiveness in relation to their cost.

Sec. 13. (a) Not later than one hundred and eighty days after the close of each fiscal year, the Commissioner shall prepare and submit to the President and to the Congress a full and complete report on the activities carried out under this Act, including the activities and staffing of the information clearinghouse under section 15.

(b) The Commissioner shall collect information to determine whether the purposes of this Act are being met and to assess the performance of programs carried out under this Act. The Commissioner shall take whatever action is necessary to assure that the identity of each individual for which information is supplied under this section is kept confidential, except as otherwise required by law (including regulation).

(c) In preparing the report, the Commissioner shall annually collect and include in the report information based on the information submitted by States in accordance with section 101(a)(10), including information on administrative costs as required by section 101(a)(10)(D). The Commissioner shall, to the maximum extent appropriate, include in the report all information that is required to be submitted in the reports described in section 136(d) of the Workforce Investment Act of 1998 and that pertains to the employment of individuals with disabilities.

Evaluation

Sec. 14. (a) For the purpose of improving program management and effectiveness, the Secretary, in consultation with the Commissioner, shall evaluate all the programs authorized by this Act, their general effectiveness in relation to their cost, their impact on related programs, and their structure and mechanisms for delivery of services, using appropriate methodology and evaluative research designs. The Secretary shall establish and use standards for the evaluations required by this subsection. Such an evaluation shall be conducted by a person not immediately involved in the administration of the program evaluated.

Section 302(b)(2)(C) of the Rehabilitation Act, as amended (the Act), requires academic institutions (i.e. grantees) which administer the RSA Long-Term Training grants to be responsible for keeping track of the employment location of former scholars supported under their training grants. Program regulations at 34 CFR 386.34 require each grantee to establish and maintain a tracking system on current and former RSA scholars regarding the payback requirement and to report to the Secretary on these matters. The program regulations at 34 CFR 33-35 and 40-43 also spell out the payback provisions and the RSA scholars' requirements to comply with them. (See Attachment A: Selected section of Section 302 of Title III of the Act, and program regulations at 34 CFR 386.33-35 and 40-43).

Sec. 302. Training

(b) Grants and Contracts for Academic Degrees and Academic Certificate Granting Training Projects

(2) Application

No grant shall be awarded or contract entered into under this subsection unless the applicant has submitted to the Commissioner an application at such time, in such form, in accordance with such procedures, and including such information as the Secretary may require, including--

(C) an assurance that data on the employment of graduates or trainees who participate in the project is accurate

RSA SCHOLARSHIP AGREEMENT

ALL RSA SCHOLARS ARE REQUIRED TO SIGN A COPY OF THIS DOCUMENT AND THE INSTITUTION PROVIDING THE FINANCIAL TO THE SCHOLAR IS REQUIRED TO KEEP A COPY OF THE ORIGINAL SIGNED AGREEMENT ON FILE AS PART OF THE STUDENT'S PERMANENT RECORD. A COPY OF THE SIGNED AGREEMENT SHOULD BE GIVEN TO THE SCHOLAR FOR HIS/HER RECORDS.

This Scholarship Agreement is entered into on the date noted below in compliance with Federal regulations at Title 34 of the CFR (Code of Federal Regulations), Part 386 related to the Long-Term Training Program funded by the Rehabilitation Services Administration of the U.S. Department of Education. The Federal regulations noted above in this Agreement and the RSA Long-Term Training Scholarship Manual have been made available to me by the institution that awarded the scholarship funds. An official of the applicable institution, by signing this Agreement, acknowledges that the terms and conditions of the scholarship have been fully disclosed to the scholar by providing all applicable information.

I, (name of scholar), agree to abide by the stipulations noted below as conditions of receipt of the scholarship for training in the (name of program) program at (name of grantee institution).

My receipt of these scholarship funds is predicated upon the expectation that I will maintain or seek employment in a designated State rehabilitation agency or in a nonprofit rehabilitation agency, professional corporation, professional practice group, or related agency providing services to individuals with disabilities under an agreement with a designated State agency. Under the terms of the Long-Term Training Program, scholarship funds include all disbursements or credits for student stipends, tuition and fees, and student travel in conjunction with training assignments.

Therefore, as a designated Long-Term Training scholar, I agree to

(1) maintain employment --

(a) in a nonprofit rehabilitation agency or related agency or in a State rehabilitation agency or related agency, including a professional corporation or professional practice group through which the agency has a service arrangement with the designated State agency;

(b) on a full- or part-time basis; and

(c) for a period of not less than the full-time equivalent of two years for each academic year for which scholarship assistance was received, within a period, beginning after I complete the training for which the scholarship was awarded, of not more than the sum of the number of years required in this paragraph and two additional years; and

(2) repay all or part of any scholarship received, plus interest, if I do not fulfill the requirements of paragraph (1) of this agreement (immediately above), except as the Secretary of Education by regulations may provide for repayment exceptions and deferrals.

(3) The employment obligation as applied to a part-time scholar will be based on the accumulated academic years of training for which the scholarship is received.

(4) Until I have satisfied the employment obligation described above, I will immediately inform the institution which awarded the scholarship of any change of name, address, or employment status and will document employment satisfying the terms of the agreement.

(5) Subject to the provisions in 34 CFR 386.41 of the Federal regulations, regarding a deferral or exception, if I enter repayment status under 34 CFR 386.43(e), the amount of the scholarship that has not been retired through eligible employment will constitute a debt owed to the United States that --

(a) will be repaid by me, including interest and costs of collection as provided in 34 CFR 386.43; and

(b) may be collected by the Secretary of Education in accordance with 34 CFR Part 30, in the case of a failure to meet the obligation of 34 CFR 386.43.

(Signature of Scholar)

(Date)

(Social Security Number of Scholar)**

Signature of Project Director or
Other Grantee Official)

(Date)

**The Student is REQUIRED to provide his/her Social Security Number for collection purposes.

RSA SCHOLAR
EXIT CERTIFICATION FORM

Instructions for Grantees/RSA Scholars: This form is to be completed and signed by the Long-Term Training scholar and RSA Project Director or other appropriate grantee official at the time the scholar exits the training program, regardless of whether a degree is obtained or all coursework has been completed.

As a training scholarship recipient, I, _____, Social Security # _____, acknowledge the following information as being true and accurate:

- (1) I received scholarship funds from (name of grantee institution) under U.S. Department of Education Grant # (Grant #) for training received in the (field of study) field.
- (2) I understand that I must work (number of years) years in order to satisfy the work requirements of the Scholarship Agreement.
- (3) The total amount of scholarship assistance received from this institution, under the Grant # above, that is subject to the work-or-repay provisions of Federal statutes and regulations is \$(dollar amount).
- (4) The work requirements must be satisfied within (number of years) years after completion of the training or after exiting the program, whichever comes first. In order to meet the full work obligation, appropriate employment must be obtained no later than (date) and completed no later than (date).
- (5) I understand that I must inform the institution that awarded the scholarship of any change in my name, address, and employment status and that I am responsible for documenting how I have satisfied the terms of my scholarship agreement until such time as the work obligation has been satisfied. My employment information will be supplied to the institution that provided the training.
- (6) I also acknowledge that I have received a copy of my signed Scholarship Agreement and this Exit Certification Form, both of which outline the work-or-repay requirements stipulated in Federal regulations, and I understand my obligations as a scholarship recipient. Additional information on the work-or-repay provisions may be found in Part 386 of Title 34 of the Code of Federal Regulations and in the Long-Term Training Scholarship Manual, both of which have been made available to me, if requested, by the institution that provided the training.

(Signature of Scholar)

(Date)

(Signature of Project Director or
Other Grantee Official)

(Date)